



**FileSurf Symbol Palm
Handheld Scanner**

**Installation and Instruction Guide
For Version 7.x**

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Chapter 1: SETTING UP THE SYMBOL PALM CRADLE ON YOUR DESKTOP

Before you Start

Exit all programs, including those that run automatically at startup. Do **NOT** place your SPT 1800 Scanner (referred to throughout this guide as “Symbol Palm” or “Scanner”) in the cradle during installation of the Desktop software.

If this is a first time installation (e.g., you are **not** upgrading from the Symbol SPT 1700 or earlier scanner), you will need to download the synchronization software from www.palm.com/software/desktop. Download the software to the C:\Palm folder.

System requirements for running this program are:

- PC running windows 95/98, 2000/ME, NT4.0 or XP
- 8MB RAM minimum, 64 MB recommended, required for Windows 2000
- 20 MB available hard disk space

Cradle Set Up

- Start with your computer turned **off**. Attach the Symbol Palm cradle to an available **Com Port** at the back of your computer then, turn your computer on.
- Double-click the **Palm Desktop.exe** to begin installation. The Welcome Screen is displayed. Click **Next**.
- Select Custom Install and expand Palm Desktop and click on the drop-down icon on Expense and select **this feature will not be available**. This will put a Red X through the option. Do the same for any of the other options you do not want to install.
- Next, you will be prompted to create a user. Type in username and click **Next**.

Tip: The user name should have the same name as the Scanner. This will create a folder in your C:\Palm directory with the same name. For example: if you enter the username Companyname1, your folder will be labeled C:\Palm\Companyname1.

- Accept the default destination folder, **C:\Palm**. Click **Next**.
- Continue to follow the installation instructions to the **Perform Mail Setup?** prompt. Choose **No**. Click **Next**, then, **Finish**.
- The following icon will be added to your system tray
 (the far right corner of Task Bar). This is called the **Sync Manager** button.
 - Click the **Sync Manager** button to display the drop down menu.
 - Choose **Local**. (unmark any other choices)
 - If prompted to select a user, highlight the username you typed in during installation and click **OK**.

- Power on your Symbol Palm by pressing the red button on the lower left corner of the device and place it in the cradle. You will notice a black and white icon (similar to the Sync Manager button) on your cradle. This is the **Hot Sync** button. Press the **Hot Sync** button.

Your desktop and your Symbol Palm are now connecting. A status window will be displayed to show the progress of the connection.

Chapter 2: SETTING UP YOUR SYMBOL PALM AND DESKTOP

Note: Your Symbol Palm uses a single Li-ion 3.7V battery. When your Symbol Palm is turned on, a scanner battery level (which indicates the life of the battery) is displayed at the top of the Home screen.

Your Symbol Palm will automatically turn off after a few minutes of idle time. When you turn the Scanner back on, it will return to the point where you left off.

Before you Start

When installing the Symbol Palm software, you must logon with Administrator rights.

Set Up the Desktop

- Create a folder in your **C:\Palm** folder named **Install**. Copy all files from **.../Handheld/SPT1700 (Palm Conduit)**, on the installation CD, into the **C:\Palm/Install** folder.
- Next, view the **FileSurf** folder and confirm **rmsuload.exe** is contained therein.

Note: If you have re-named the folder where **FileSurf** is located, make sure the new folder name is located in the Path Statement.

- To check the Path Statement on a Windows 2000 or Windows XP PC:
 - Go to Control Panel, double-click the System icon
 - Click the Advanced tab and select Environment Variables (middle panel). On Windows XP it will be at the bottom of the screen.
 - Highlight *Path* under *System Variable* to display the path.
C:\FileSurf (or other FileSurf folder name) should be included in the Path. If the FileSurf path is not part of the Path Statement, highlight *Path* under *System Variables*; click *Edit*; enter the path for FileSurf, example: **C:\FileSurf**; reboot
- To check the Path Statement on a Windows NT PC:
 - Go to Control Panel, click the System Properties tab, click the Environment tab.
 - Highlight *Path* under *System Variable* to display the path.
C:\FileSurf (or other FileSurf folder name) should be included in the Path. If the FileSurf path is not part of the Path Statement, highlight *Path* under *System Variables*; go to the *Value* text field in the bottom half of the screen; enter the path for FileSurf, example: **C:\FileSurf**; reboot
- To check the Path Statement on a Windows 95/98 PC:
 - Click the *Start* button, select *Run*, enter *Command*

- At the DOS Command Line, type PATH to display the Path Statement. If the Filesurf folder is not listed in the Path Statement, edit the Autoexec.bat to include the path as follows:
- Go to the root directory where the Autoexec.bat is located (type **CD** *press enter*) then edit the Autoexec.bat (type **EDIT** **AUTOEXEC.BAT** *press enter*) Your autoexec.bat editing screen should now be displayed. Scroll or **Search** through your autoexec.bat for the PATH statement. Add the FileSurf path, save your changes and reboot your PC.

Install FileSurf on your Symbol Palm

Check your Symbol Palm for an existing installation of FileSurf. Power on the Symbol Palm and scroll through the Home menu. If FileSurf is not installed on your Symbol Palm, follow the instructions below:

- Go to **Windows Explorer** and view the contents of the **C:\Palm\Install** folder. Double-click on the **RmsHand.prc** file. Select the user name of your Symbol Palm and click OK. Make sure **RmsHand.prc** is listed under File Name! Click Done, then exit this window. The following message will be displayed “The listed file(s) will be installed during your next hotsync operation”.
- **NOTE:** If you are running the latest version of the palm desktop software (Version 4.1) you will be prompted to confirm the add when double-clicking on the rmshannd.prc file. Hit ok and check the window to make sure **RmsHand.prc** is listed under File Name! on the left-hand side of the screen. If the file appears there close the window. If does not, click add and specify the rmshand.prc file that you want to use. The following message will be displayed: “The listed file(s) will be installed during your next hotsync operation”.
- Place the Symbol Palm in its cradle and press the **Hot Sync/Local Sync** button on the cradle.
- Power on the Symbol Palm. Scroll through the Home menu. You should now be able to see and select RMS/FileSurf.
- Go to Windows Explorer and view the C:\Install folder. Double click **setup.exe**. An installation wizard will prompt you throughout the install. Follow all instructions.

TIP: To ensure the set-up was successful, go to the **Sync Manager button (far right corner of your Windows Task bar)**. Click on the **Sync Manager button** and select **Custom** from the pop up menu to display the Custom dialog box. Make sure **RmsCond appears** under the Conduit column heading.

To ensure accurate synchronization, you will need to program your Symbol Palm with the **EXACT** same time and date as your PC.

Set Time and Date

- From the Home screen on your Symbol Palm, select **Prefs.** (Preferences)
- Use your Symbol Palm stylus pen to select **Set Time**
- Use the number counter to set time, then touch **OK** to save changes and return to Preferences screen
- Select **Set Date**; select the desired date from the pop up calendar; you will automatically return to the Preferences screen

Note: *An inconsistent time and date between the PC and Symbol Palm will result in an error message!*

Test Installation

- Power on the Symbol Palm, go to the Home menu and select FileSurf to access the FileSurf Handheld screen
- Press the Menu icon and open the *Scan* menu.
- Select *Move* then, press *Done*. Use the test data provided to test the upload.
- Place the Symbol Palm in the cradle and press the HotSync button on the Scanner. If successful, the Hot Sync upload screen will be displayed and track the progress of the synchronization.

If you have designated a printer, the upload utility will automatically send a report to the printer upon completion of the hot sync.

Chapter 3: SCANNING WITH THE SYMBOL PALM

WARNING! Avoid looking directly into the laser beam! Focusing directly on the laser can cause irreparable damage to the eye!

About Scanning

To scan an object, you may press any one of the yellow buttons on your Scanner (either side button or the center button).

- Power on your Symbol Palm scanner and select **FileSurf** from the Home screen to access the FileSurf Handheld screen.
- At the bottom of the FileSurf Handheld screen you will be prompted to “Select scanning option “. Press the *menu* icon and select one of the following options: **File**, **Scan** or **Options**.
 - **File** allows you to delete your scanning session and clear the screen
 - Selecting **Scan** will drop down the following menu: **Active**, **Archive**, **Deliver**, **Move**, **Onsite**, **Sweep**, and **End**
 - **Options** provides RMS/FileSurf Symbol Palm Handheld Scanner version information.

Foreign Barcodes

Note: *RMS/FileSurf will recognize your Foreign Barcodes (any barcode not created by RMS/FileSurf) provided the Foreign Barcodes have been associated in RMS/FileSurf at the appropriate level*

You are now able to tell the handheld what Foreign Barcode you are scanning.

When you click on the Filesurf icon on the handheld, on the top left corner it will say Filesurf (if you are in a scanning option it will state Filesurf –and the scanning option you are in). You will be prompted with three options, Click on Options, click on foreign barcodes, a window will appear as follows:

Assume all foreign barcodes as:

- ☐ Boxes
- ☐ Jackets

- ☐ Files
- ☐ Ask when scanned

When clicking on any of the above the handheld will assume all foreign barcodes as your selection.

If you choose “Ask when scanned”, the handheld will prompt you with the following:

Which type?

Box	Jacket	File	Cancel
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Note: At any time during you scanning session, you can go back to FileSurf, options, foreign barcodes and change this.

Deliver

The *Deliver* feature tracks the delivery of a Box, Redweld or File. This feature is used when scanning items for delivery to multiple locations. This is similar to a *Checkout* (using the Circulation/Checkout function of FileSurf). The Deliver feature updates the status of the delivered items as follows:

- Box status is updated to **B** = Boxed On-site
- Redweld and File status is updated to **C** = Circulating (except where the Redweld or File is associated with a box, in which case, the Redweld or File assumes the Box status).
- Redwelds and Files circulate in a room with the room owner.
- The Status Log report identifies the Employee who delivered the Box, Redweld or File.
- Start at the FileSurf Handheld screen; press the Menu icon and select Scan to open the Scan menu or scan the Deliver barcode
- Select Deliver to access the Deliver screen
- You will be prompted to “scan employee”. Scan the **Employee-Room barcode** of the Requestor. You can also type in the employee-room code, using the on screen keyboard.

Access the On Screen Keyboard

- Start at the Deliver screen. When prompted to “scan employee”, press the **abc** icon next to the menu button to display the on screen keyboard. You must enter a **plus sign (+)** and **E** (for Employee) before entering the employee ID (example: **+E001**). You can access the **plus sign (+)** by pressing the **123** icon.
- Scan the barcode of the Location of the delivery.
- Scan the items (Boxes, Redwelds or Files).
- When finished, press Done to return to the FileSurf Handheld screen. Select *Menu>Scan* to perform another scan option.

- To end the Deliver session, go to *Menu>Scan* and select *End* or scan the >End barcode.

Move

The *Move* function is used to change the location of a Box, Redweld or File. The Move feature will update the **Home Location** and **Current Location** of a Box, Redweld or File.

Note: *Only the Last Seen information will be updated on the circulation tab of the file.*

- Click the *Menu* icon and open the *Scan* menu.
- Select **Move**, or scan the >**Move barcode**. You will be prompted throughout the Move session in the lower left corner of the screen on your Symbol Palm.
- Follow all prompts. When finished, return to the *Scan* menu and select *End*. The Symbol Palm will confirm the end of the Move session with **//MOVE: Ended**

The following table outlines the Move updates:

ITEM	TO	UPDATE HOME LOCATION	UPDATE CURRENT LOCATION	STATUS OF MOVED ITEM:
Box (scan Box only – no Files)	Room or Shelf		4	Boxed on site: Current Location of the Box and all its <i>associated</i> Files and Redwelds (Files/Redwelds where Home Box number is the same as this box) is updated to <i>Boxed on Site</i> and reflect the new location, <i>except</i> where the current status is <i>Circulating</i> (in which case, <i>only</i> the home box is updated, the status remains unchanged.)
Redweld (scan Redweld only – no inner files)	Room or Shelf	4	4	Shelved: Home Location and Current Location of the Redweld and all its <i>associated</i> Files (Files where Redweld number is this Redweld) are updated to <i>Shelved</i> and reflect the new location, <i>except</i> where the current status is <i>Circulating</i> (in which case <i>only</i> the Home Location will be updated)
File	Room or Shelf	4	4	Shelved: If the File was <i>Circulating</i> , the status is changed to <i>Shelved</i> . The Circulation Tab (Folders Form) is also updated; the <i>Status</i> of the last request is changed to <i>History</i> .
Redweld (scan Redweld only – no inner files)	Box		4	Redweld and its Files assume the status of the Box. The Home Box and Current Box are updated to reflect the new location, <i>except</i> where the current status is <i>Circulating</i> (in which case <i>only</i> the Home Location will be updated)
File	Box		4	File assumes status of Box. Home Box and Current Box are updated.
File	Redweld	4	4	File assumes status of Redweld. Home and Current locations are updated to reflect the new location.

Sweep

The Sweep feature is used to scan (inventory) the contents of a Room, Shelf, Redweld or Box and update the Current Location and Status of the items swept to show they are Circulating. See the table below for details.

- Click the *Menu* icon and open the *Scan* menu.
- Select **Sweep**, or scan the **>Sweep = barcode**. You will be prompted throughout the Sweep session in the lower left corner of the screen on your Symbol Palm.
- **During your Sweep scanning, when you scan a box or Jacket you will receive a new pop up box stating the following:**

Do you want to scan the contents of the Box? Note it will state Jacket if you scanned a jacket.

Yes	No	All	None
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Yes = Will allow you to scan the contents of the current scanned item (box or Jacket)

No = Will not allow you to scan the contents of the current scanned item (box or Jacket)

All = Will allow you to scan the contents of all scanned items: example: scan a box, all, will allow/prompt you each time with “do you want to scan the contents of this box” during your sweep session

None = Will not allow you to scan the contents of any of the scanned items: example, scan a Jacket, None, will not prompt you “do you want to scan the contents of this Jacket” each time during your sweep session.

Note: At any point during your scanning session you can reset the scanning option to prompt you each time by clicking on FileSurf – Sweep at the top left corner of the Palm, Click on Options, and click on Reset Contents option, at this point you will receive all prompts.

When clicking on “Done” on the handheld during a sweep session (either after scanning the contents of a box or ended your session). The following prompt will appear:

Have you scanned the full contents of this Room? (Again, depending on when you click the done button, example: if after a box the prompt will say Have you scanned the full contents of this box?)

Yes	No	Resume
-----	----	--------

Yes = You will receive an additional prompt, “Are you sure you scanned the full contents of this Room/Drawer ?”

Yes	No
-----	----

Yes = would end the item you scanned.
No = will bring you back to the scanning screen for you to continue scanning

No = You will receive an additional prompt, “Are you sure you don’t want to scan the full contents of this Room?”

Yes	No
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Yes = would end the item you have scanned.
No = will bring you back to the scanning screen for you to continue scanning.

Resume = Would bring you back to your scanning page to continue scanning.

- Follow all prompts. When finished, return to the *Scan* menu and select *End*. The Symbol Palm will confirm the end of the Sweep session with **//SWEEP: Ended**

Note: Upon completion of the Sweep, you will be prompted to confirm completion (“have you scanned the full contents of this Room/Drawer?”). If you answer Y (Yes), RMS/FileSurf will change the status of any File NOT SCANNED, whose **last known** location is the Redweld/Box/ Shelf/Room just swept, to UNKNOWN. Answer N (No) and no changes will be made to the items **not scanned**.

The following table outlines the Sweep updates:

ITEM	BOX STATUS	REDWELD STATUS	FILE STATUS
Room or Shelf	Circulating with Room Owner (if no room owner, Employee field will not be changed)	Circulating with Room Owner (if no room owner, Employee field will not be changed)	Assumes the status of its associated Redweld If not associated with a Redweld, File status is Circulating with Room Owner (if no room owner, Employee field will not be change)
Box	No change	If Box status is Archived, Redweld assumes same status If Box status is Boxed on site, Redweld status is Boxed on-site with Room Owner (if no room owner, Employee field will not be changed)	<u>Box status is Archived:</u> If File is associated with a Redweld, File assumes Redweld status. If File is not associated with a Redweld, File assumes Box status <u>Box status is Boxed on site:</u> File status is Boxed on-site with Room Owner (if no room owner, Employee field will not be changed)
Redweld	Not applicable	No change	File status same as Redweld

Onsite

This feature is used to track Boxes on-site (returned from the warehouse or stored in boxes on site). When tracking Boxes on site, you are not required to scan the contents. As indicated above (see the *Move* table), Redwelds and Files may also have a Boxed on Site status, making their movements as easy to track as Boxes. FileSurf™ will update the current status and current location of all Redwelds and Files whose status is Boxed on-site. The Box status is updated to Boxed on site and reflects the scanned room/shelf in the current location. The Circulation History tab will indicate the Box number and location.

- Click the *Menu* icon and open the *Scan* menu.
- Select **Onsite**, or scan the **>Onsite = barcode**. You will be prompted throughout the Onsite session in the lower left corner of the screen on your Scanner.
- Follow all prompts. When finished, return to the *Scan* menu and select *End*. The Symbol Palm will confirm the end of the Onsite session with **//ONSITE: Ended**

Active

The Active feature should be used on Redwelds and Files that have been inactive for a considerable length of time, but which still need to be kept current in the system. The Active feature will update the *Last Seen* and *Last Used* dates for the items scanned. For example, a file may be actively updated within the file room but has not been requested or checked out for several months (or more). The system, therefore, will have old *Last Seen* and *Last Used* dates, which may make the File eligible for archiving. The status of the scanned item will not be changed.

- Click the *Menu* icon and open the *Scan* menu.
- Select **Active**, or scan the **>Active = barcode**. You will be prompted throughout the Active session in the lower left corner of the screen on your Scanner.
- Follow all prompts. When finished, return to the *Scan* menu and select *End*. The Symbol Palm will confirm the end of the Onsite session with **ACTIVE: Ended**. Because there is only one screen, it cannot go back one step.

Archive

Use this feature to scan Boxes being sent to an offsite storage facility.

- **Box:** When archiving a Box, the Status is updated to *Archive*
 - **Redweld:** If there is a Redweld associated with the archived Box, the Redweld assumes the same status and the Home Box and Current Box are updated to reflect the location of the offsite storage facility.
 - **Files:** If there are Files associated with the Redweld, the Files' Home Box and Current Box fields are updated to reflect the offsite storage facility
 - If the Files are Circulating, the status is unchanged and the Home Box is updated to reflect the offsite storage facility.
 - If the File is not associated with a Redweld, the status is changed to Archived and both the Home Box and Current Box are updated to reflect the location of the offsite storage facility.

Chapter 4: UPLOADING FROM THE SYMBOL PALM TO FILESURF

About the Upload

You do not have to run the FileSurf application to upload data to your PC.

- Place the Symbol Palm in the cradle and press the HotSync button on the Symbol Palm. If successful, the Hot Sync upload screen will be displayed and track the progress of the synchronization.
- If you have designated a printer, the upload utility will automatically send a report to the printer upon completion.
- A log file will be created in the **C:\FileSurf** directory

Chapter 5: MENU SCANNING SECTION

Delivery: *\$1*

Move: *\$2*

Sweep: *\$3*

Onsite: *\$4*

Active: *\$5*

Archive: *\$6*

End: *\$0*

Appendix A:

If you are installing Palm(tm) Desktop 3.0 (or higher) software on a PC that is running Windows NT 4.0, Windows 2000 or Windows XP be aware that it requires you to have Administrator access to the system in order to install any software. If you have only User access, you must ask your Network or System Administrator (or another person with Administrator access) to assist you with the following procedure:

1. Have your System Administrator log on to your PC and start the installation process as usual.
(DON'T FORGET TO RUN OUR SETUP TO INSTALL THE RmsCond.dll CONDUIT)
2. Open the Start menu and select Programs. The Programs menu is split into two sections. Notice that the Palm Desktop 3.0 (or higher) software appears in the Current User Program Group in the upper section of the Programs menu.
3. Since the Administrator is the current user logged into your PC, you must move the Palm Desktop program folder from the Current User Program Group to the All Users Program Group in the lower section of the Programs menu, in order for you to use it when you are personally logged in.
4. Launch Windows Explorer.
5. Locate the Palm Desktop program folder in the following path:
C:\Winnt\Profiles\Administrator\Start menu\Programs Select the Palm Desktop folder, and then click the right mouse button and select Cut. The icon should disappear.
6. Locate the destination where you will place the Palm Desktop program folder in the following path: C:\Winnt\Profiles\All users\Start menu\Programs. Make sure that you are in the Programs directory, and then click the right mouse button once more and select Paste. The Palm Desktop folder appears.
7. Ask your System Administrator to log out of the system and log on with your own User account.
8. Go to the Start menu and select Run.
9. Type in the following path: C:\Palm\hotsync -r. This rebuilds the Registry keys for the Palm software.

Appendix A (Cont'd):

10. To ensure that the HotSync(R) Manager launches whenever you start up your PC, locate the Start Up folder in Windows Explorer using the following path:
C:\Winnt\Profiles\All users\Start menu\Programs\Start Up. Select the HotSync Manager icon, and then click the right mouse button and select Properties.

(If you don't find the HotSync Manager icon there, copy the hotsync shortcut icon from C:\Winnt\Profiles\All users\Start menu\Programs\Desktop to C:\Winnt\Profiles\All users\Start menu\Programs\Start Up)

11. Select the Shortcut tab in the next window and make sure that the path in the Target field is correct.

12. To test your setup, perform a HotSync operation. If it works, your installation is successful.

Note: Make sure there is a space between "hotsync" and "-r" when typing this path.

Note: In some installations the above command "hotsync -r" fails to update the registry. In this case, run the file **MyPalm.reg**.

Note: If you are still experiencing any problems with the installation please contact our helpdesk at 201-797-6676 option 1.